



Report of Contributions and Expenditures For Legislative Candidates and Officeholders

(Utah Code Section 20A-11)

Name of Candidate or Officeholder			Phone Number	
Karen W. Morgan			(801)943-0067	
Street Address	Suite/Apartment/PO Box:	City	State	Zip
8378 Austrian Way		Cottonwood Heights	UT	84121
Office	District Number	County	Political Party	
Utah Senator	8	Salt Lake	Democratic	

Type of Report (Check the appropriate box)	
INTERIM REPORTS:	FINAL REPORT:
<input type="checkbox"/> Seven days preceding Party Convention (Required by all candidates)	<input type="checkbox"/> Final Report (Required by all candidates and officeholders as soon as they close campaign accounts)
<input type="checkbox"/> Seven days preceding Primary Election (Required by all candidates)	
<input type="checkbox"/> August 31st (Required by all candidates)	
<input type="checkbox"/> Seven days preceding a General Election (Required by all candidates)	
YEAR-END REPORT	<input type="checkbox"/> Yes
<input checked="" type="checkbox"/> January 10th of every year	<input checked="" type="checkbox"/> No
	Is this report an amendment?

Report Verification	
I, <u>Karen W. Morgan</u>	
Name of Candidate	
affirm that this Report of Contributions and Expenditures is true, accurate and correct to the best of my knowledge.	
<u>Karen W. Morgan</u>	
Signature of Candidate	
<u>1/22/2009</u>	
Date	

To File this Form
Mail or deliver to
Lieutenant Governor's Office
Utah State Capitol, Suite 220
Salt Lake City, UT 84114-2325
(801) 538 - 1133
For More Information
Contact the Lieutenant Governor's Office
(801) 538 - 1041
1-800-995-VOTE(8683)
elections@utah.gov

For Office Use Only	
<input checked="" type="checkbox"/> Entered	_____
<input type="checkbox"/> Copied	_____
Date Received	

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Candidate or Officeholder's Last Name Morgan	
Date of Report 1/22/2009	

Summary Page

(Complete this page after filling out all Schedule A and Schedule B forms)

REPORTING PERIOD DETAILS			
Report: Year End			
Beginning Date: 10/29/2008			
Ending Date: 12/31/2008			
Due Date: 1/12/2009			
BALANCE SUMMARY			YEAR TO DATE
1	Balance at Beginning of Reporting Period (Refer to line 5 of last report)	\$12,316.93	
2	Total Contributions Received (See Schedule A)	\$9,919.59	\$65,357.13
3	Subtotal (Add lines 1 & 2)	\$22,236.52	
4	Total Expenditures Made (See Schedule B)	\$14,342.83	\$57,463.44
5	Ending Balance (Subtract Line 3 from Line 4)	\$7,893.69	

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Candidate or Officeholder's Last Name Morgan	
Date of Report 1/22/2009	

Schedule A

Itemized Contributions Received

I = In Kind, L = Loan, A = Amendment

Date Received	Name of Contributor	Complete Mailing Address	I	L	A	Contribution Amount
10/29/2008	Kristin D. Fink	5179 Danshill Circle SLC, UT 84118				\$25.00
10/29/2008	Lawyers Involved for Utah	645 South 200 East SLC, UT 84111				\$500.00
10/29/2008	Patricia W. Jones	4571 Sycamore Drive SLC, UT 84117				\$2,000.00
10/29/2008	Robert J. DeBry & Associates	4252 South 700 East SLC, UT 84107				\$500.00
10/29/2008	Russ & Larry Ann Fericks	1351 South Lincoln Street SLC, UT 84105				\$100.00
10/29/2008	Siegfried & Jensen	5664 South Green Street Murray, UT 84123				\$500.00
10/30/2008	Alta Ski Area	P.O. Box 8007 Alta, UT 84092				\$500.00
10/30/2008	Gene Davis	865 East Parkway Ave. SLC, UT 84106				\$2,000.00
10/30/2008	JLS Funding, LLC	2511 South West Temple SLC, UT 84115				\$500.00
10/30/2008	Regence BlueCross BlueShield	P.O. Box 30270 SLC, UT 84130				\$250.00
10/30/2008	Utah League of Credit Unions	1805 South Redwood Road SLC, UT 84104				\$1,000.00
10/31/2008	Kathryn Rowley	151 Springhill Drive North Salt Lake, UT 84054				\$50.00
10/31/2008	Kay Erwin	7879 Deer Creek Road SLC, UT 84121				\$50.00
10/31/2008	Shirley R. Ririe	163 Ensign Vista Drive SLC, UT 84103				\$25.00
11/1/2008	Utah Association of Financial Services	60 South 600 East SLC, UT 84102				\$500.00
SUB TOTAL FOR THIS PAGE						\$8,500.00
TOTAL CONTRIBUTIONS RECEIVED						\$8,500.00

Total Contributions Received on this page is the sum of this page and previous pages subtotals

Attach additional pages if needed

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Candidate or Officeholder's Last Name Morgan	
Date of Report 1/22/2009	

Schedule A

Itemized Contributions Received

I = In Kind, L = Loan, A = Amendment

Date Received	Name of Contributor	Complete Mailing Address	I	L	A	Contribution Amount
11/4/2008	Jennifer Falk	2241 Hubbard Ave SLC, UT 84108				\$100.00
11/4/2008	Roger Wilcox	3743 Little Cottonwood Lane Sandy, UT 84092				\$20.00
11/4/2008	Valeo Incorporated/UPEA	1000 West Bellwood Lane Murray, UT 84123				\$500.00
11/11/2008	Xmission	51 East 400 South Suite 200 Salt Lake City, UT 84111	X			\$50.00
11/12/2008	MedImmune Affairs, Inc.	One MedImmune Way Gaithersburg, MD 20878				\$200.00
12/8/2008	Philip Dyer	136 South Main Street Suite 221 Salt Lake City, UT 84101				\$250.00
12/12/2008	Xmission	52 East 400 South Suite 200 Salt Lake City, UT 84111	X			\$50.00
12/31/2008	Closed House Campaign	8378 Austrian Way Salt Lake City, UT 84121				\$249.59
SUB TOTAL FOR THIS PAGE						\$1,419.59
TOTAL CONTRIBUTIONS RECEIVED						\$9,919.59

Total Contributions Received on this page is the sum of this page and previous pages subtotals

Attach additional pages if needed

X - Not required before May 12, 2009

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Candidate or Officeholder's Last Name Morgan	
Date of Report 1/22/2009	

Schedule B

Itemized Expenditures Made

I = In Kind, L = Loan, A = Amendment

Exp. Date	Name of Recipient	Purpose	I	L	A	Expenditure Amount
10/29/2008	Office Depot	Supplies				\$28.83
10/29/2008	ProBuild	supplies				\$30.64
10/29/2008	Progressive Direct Mail	mailing				\$3,257.88
10/30/2008	Samantha Starr	website				\$100.00
10/30/2008	Smith's	supplies				\$30.49
10/31/2008	Home Depot	supplies				\$58.74
10/31/2008	Imaginos	signs and stakes				\$553.40
11/1/2008	Chase Clyde	campaign work				\$150.00
11/1/2008	Rachel Kellersberger	campaign work				\$100.00
11/3/2008	Famous Dave's	campaign thank-you dinner				\$277.00
11/3/2008	The Bruno Group	printing				\$4,062.67
11/3/2008	USDC	election night				\$100.00
11/3/2008	USDC	donation				\$1,000.00
11/4/2008	ActBlue	online fee				\$4.74
11/4/2008	Smith's	supplies				\$16.33
11/8/2008	Chase Clyde	campaign work				\$100.00
11/11/2008	CapitalOne	supplies				\$14.70
11/12/2008	Xmission	website	X			\$50.00
11/13/2008	Educators Mutual	GOTV phone lines				\$100.00
11/17/2008	Postmaster	stamps				\$50.40
SUB TOTAL FOR THIS PAGE						\$10,085.82
TOTAL EXPENDITURES MADE						\$10,085.82

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Attach additional pages if needed

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Candidate or Officeholder's Last Name Morgan	
Date of Report 1/22/2009	

Schedule B

Itemized Expenditures Made

I = In Kind, L = Loan, A = Amendment

Exp. Date	Name of Recipient	Purpose	I	L	A	Expenditure Amount
11/17/2008	Smith's	thank-you gift cards				\$130.86
11/19/2008	Capitol Store	thank-you gifts				\$346.97
11/21/2008	Qwest	campaign phone				\$9.19
11/22/2008	Gene David	reimbursement				\$2,000.00
11/25/2008	Salt Lake County Clerk	precinct voting results				\$25.00
12/3/2008	CapitalOne	thank-you gifts				\$139.39
12/10/2008	Emily Hollingshead	website design				\$175.00
12/12/2008	Bryson Morgan	website fee reimbursement				\$48.18
12/12/2008	Xmission	website	X			\$50.00
12/15/2008	Bryson Morgan	campaign work				\$500.00
12/15/2008	Emily Hollingshead	website				\$650.00
12/27/2008	Office Depot	supplies				\$134.54
12/30/2008	CapitalOne	supplies				\$37.88
12/31/2008	Xmission	domain renewal				\$10.00
SUB TOTAL FOR THIS PAGE						\$4,257.01
TOTAL EXPENDITURES MADE						\$14,342.83

Total Expenditures Made on this page is the sum of this page and previous pages subtotals

Attach additional pages if needed

X - Not required before May 12, 2009